RSO Training – Spring 2022

PRESENTED BY MARWA ALY

GUEST SPEAKERS

BRIAN SHUFFIELD,
TAMISHA GREATHOUSE,
and CLINT HICKMAN
Affiliate Funding/RSO Funding

- Affiliate Funding is an application process that takes place twice a year to help Registered Student Organizations (RSOs) with over 50% graduate and professional student membership secure funding for events and programs.
- Awards are made one semester in advance for projected use during the upcoming academic semester.
- There are two types of funding awards:
  1. **Annual funding** is intended to provide funding to RSOs that will plan and execute larger events to serve the graduate and professional students of WSU and foster connections with the WSU community.
  2. **Semester funding** is intended to provide funding on a more flexible basis to RSOs that serve Members of GPSA in various capacities.
Affiliate Funding, continued …

- **Annual funding** allocations have a minimum of $1,000 and a maximum of $2,500 for the academic year. The RSO can request the rest of the $2500 by the Spring, if they funded lower than the maximum amount in the Fall.

- **Semester funding** allocations have no minimum and a maximum of $2,000 in total with any allocations for both semesters.

- Any award over $1,000 is recommended by the budget committee to be approved by the Senate.

- RSO funds must be spent within the period for which they are allocated (academic year or semester).

- Any remaining balance after that period will revert to the GPSA.

- Please see the [GPSA Bylaws](#) (Article VI, Sections 3 and 4) for more specific information.
Affiliate Funding, continued ...

- All RSOs are required to complete **a follow-up summary of their spending** at the end of the funded period to **maintain their eligibility for future affiliate funding**.

- The Semester Review form will be created and posted to the GPSA website where it is easily accessible. The due dates for these forms will be on the same date as when future applications are due in order to ensure the RSO has followed all guidelines for funding.
RSO Funding Timeline – To request fund through the Spring

- **October 11** – Spring 2022 RSO Funding Application opens.
- **November 1** – Spring 2022 RSO Funding Application closes.
- **November 14**, confirm Budget Committee decisions regarding funding applications. RSO will receive award letter decisions.
- **November 24** – present Spring RSO Funding awards to the Senate.
RSO Funding Timeline – To request fund through the Fall/annual (2022-2023)

- **March 06** – RSO Funding Application opens.
- **March 28** - RSO Funding Application closes.
- **April 11** – RSO will receive award letter decisions.
- **April 18** – Present RSO Funding awards to the Senate.
People to Know

• **Marwa Aly**, VP of GPSA (first line of approval for all affiliate funding requests)

• **Brian Shuffield**, Executive Director, Student Involvement

• **TaMisha Greathouse**, Associate Director, Student Involvement (GPSA Expenditure Authority; she approves requests after I sign off)

• **Clint Hickman**, The RSO account manager in the Cougar Card center

• **Student Involvement Finance Team** (will be sent all requests. Does all the expense processing.

  Si.finance@wsu.edu
Types of requests

- **IRI’s** – used for WSU vendors/departments (CougPrints, University Printing, Ferdinands, etc) – Student involvement can facilitate these payments directly to the department/WSU vendor. Your group would still work with the vendor to set up the order; GPSA would approve the purchase request, then Student Involvement would facilitate the payment.

- **PO’s** – used for non-WSU vendors that accept PO's (Subway is one example) – Your group submits the PO to the vendor as a promise to pay. The vendor would then invoice us (Student Involvement) after the event and SI pays them directly.

- **Pcard** – RSO purchases are generally prohibited on the Pcard unless prior approval has been given. Your Group will work with the vendor and provide the account information to the Pcard purchaser. Only authorized staff and GPSA Officers (President, VP, VPLA can checkout the Pcard for purchasing.

- **Reimbursement** – For other request, your group would facilitate the purchase with your personal funds and request reimbursement via the Cougar Card Center. After the expense posts to your RSO account SI would do an expense transfer to the GPSA budget. We would need an itemized receipt submitted to our department showing all the items purchased and the payment applied for the purchase. Purchasing Request form would still be required in advance of purchase.
Steps to use the Affiliated fund

The GPSA workday Program/ Account # to use for all types of requests is PG00009042

1. Complete a purchasing request form. Indicate what the event is, when it is being held, who is attending. Indicate what you are purchasing, how many, the vendor information, and the total amount. https://studentinvolvement.wsu.edu/forms

2. Once complete, send the request form in advance (72 hours) prior to the event to the GPSA Vice President at vpgpsa@wsu.edu, and TaMisha Greathouse at tamisha.greathouse@wsu.edu to review the form, make sure the purchase falls within the S&A and University spending guidelines, sign, and send the request to the Student Involvement finance team to process it.

3. You will be cc’d on the email to answer any questions, add more context, or follow up with needed paperwork.

Kindly, share itemized receipts and an attendee sheet after your event.
Affiliate funding, continued …

- Requests are processed 1 of 2 ways.

  1) Your organization would purchase the items, and the request would be processed as a reimbursement to your RSO. From there, you can reimburse the member that purchased the items.

    i.  This is the most common option for groups with a similar request to yours.

    ii. You will need to turn in a receipt, and an attendee list after the event for the process to start after the request is submitted.

  2) If possible, we can purchase items to have delivered to the GPSA office for groups to pick up.

    i.  This is usually only used for larger purchases, online orders, and things, but we need the paperwork done in advance (72 hours) to make sure the order arrives in time for your event. (ex. Amazon orders)
Steps to process reimbursement (an Expense Transfer Request (ETR))

1. Complete a purchasing request form as instructed before. and include your RSO account# in the comment section. [https://studentinvolvement.wsu.edu/forms](https://studentinvolvement.wsu.edu/forms)

2. Once complete, send the request form in advance (72 hours) prior to the event to the GPSA Vice President at vpgpsa@wsu.edu, and TaMisha Greathouse at tamisha.greathouse@wsu.edu TO review the form, make sure the purchase falls within the S&A and University spending guidelines, sign, and send the request to the Student Involvement finance team to process it.

3. Clint Hickman in the Cougar Card Center can confirm your RSO account, and GPSA-VP can confirm the GPSA budget.

4. You will be cc’d on the email to answer any questions, add more context, or follow up with needed paperwork.
Steps to process reimbursement (an Expense Transfer Request (ETR)), continued...

- Once GPSA and the Expenditure Authority approve your request, you can then make your purchase with your personal funds and request reimbursement via your RSO account.
- SI would transfer the expense to the GPSA budget after it posts.
- Receipts will need to be sent to the SI finance email chain started for the request and an attendee sheet might also be needed.
- After submitting the receipts and attendee list for the event after, you would need to work with the Cougar Card Center (Clint Hickman) and complete the RCI form for the reimbursement process to the purchaser.
The Truth About Gift Cards and Prizes

- Affiliate funding cannot be used for **cash prizes**.
- **Gift card** purchases will not be approved purchases for RSO Affiliate funds due to new campus policies.
- Finance won’t be able to process a reimbursement for a student fee payment.
- RSO can use affiliate funds for **prizes at event** as long as the prize eligibility and distribution follow the S&A guidelines around Prizes.
- For any prizes awarded a **prize log** must be completed for the event.
- Prizes will be **limited** to **no more than 5 prizes per events, no more than $500 total** spend on prizes, **no more than $250 as a value for a single prize**.
  - This means you could do 5-$100 prizes at an event or 2-$250 prizes.

Here are the links regarding the policy:
70.44 Gift Cards and Cash Equivalents Purchase and Use | PR&F site | Washington State University (wsu.edu)
Catering rules for RSO

- **Information we'd need**: Who the cater is? How long they are on campus (drop off service or full-service catering)? invoice for services and what was agreed to by the RSO.
- If they are already set up in workday as a vendor to process the payment, this will be helpful.
- If they aren’t, THE Finance can set them up. With workday the process can take over 10 business days.
- To set the vendor up in the system, the RSO will work with Clint in the Cougar Card center and provide the following items: An **RCI** For the vendor payment (this is to issue the check to the vendor) The Vendors **W-9** form The invoice from the vendor for what is being paid for and services, and **COVID Declaration form** (for on campus only for contracted vendors. It is not for food delivery) as well. This doesn't apply for drop off services. Clint will also need a copy of the signed purchase request from GPSA and invoice from the vendor showing what is the service being provided and the amount to be paid.
- After the event: Receipt/final invoice, attendee list after the event.
Guest Speakers

- Brian Shuffield
  Executive Director, Student Involvement
  shuffield@wsu.edu

- TaMisha Greathouse
  Associate Director, Student Involvement,
  CUB 320
  509-335-6816
  tamisha.greathouse@wsu.edu

- Clint Hickman
  Program Coordinator
  CougarCard Center CUB Rm G60
  clint.hickman@wsu.edu
Reminder!

• event though your budget proposal is approved, each event purchase request needs to be submitted in advance of the even (72 hrs.)

• **All methods require prior approval from GPSA & our Expenditure Authority** – requested via the Purchase Request form.

• Approvals will follow what was approved in your original Affiliate funding application. Any changes will need to be approved by GPSA Budget Committee, GPSA VP, and SI staff in advance.

• Please familiarize yourself with the S&A guidelines, University BPPM policies, and GPSA Affiliate funding expectations.

• Kindly, share the itemized invoices and the attendance list after the event.
If you have any question, do not hesitate to reach out to the GPSA Vice President at vpgpsa@wsu.edu, and TaMisha Greathouse at tamisha.greathouse@wsu.edu
Thank you